**Fermilab**

# FermiWorks
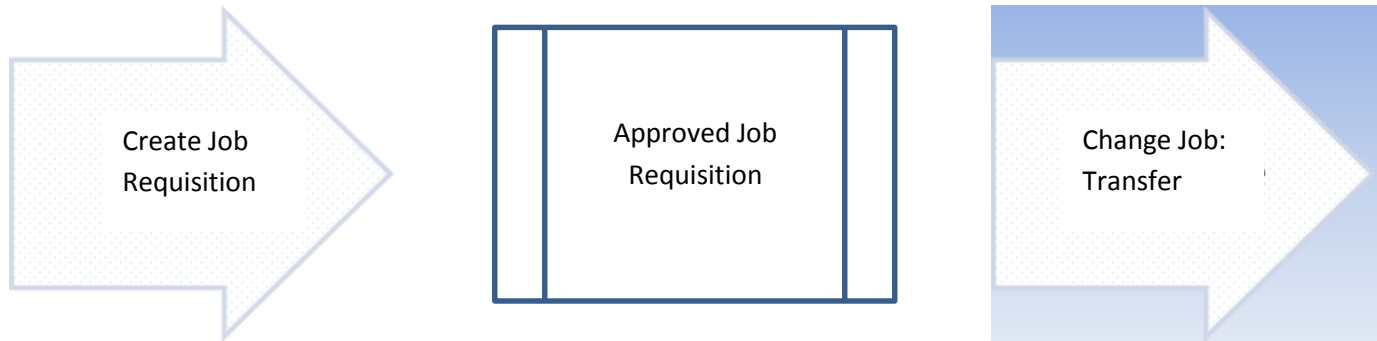# Change Job:  Transfer
## 06.22.2015

| Create Job Requisition | Approved Job Requisition | Change Job: Transfer |

In order to transfer a worker, two different processes must be completed in FermiWorks:

1.  Create a Job Requisition: Transfer
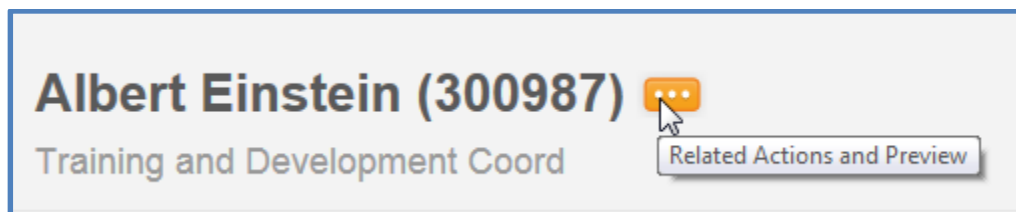2.  **Change Job: Transfer**

This is the second process.  Once the job requisition for a transfer has been approved, the Change Job > Transfer process can be completed in FermiWorks.  To complete the transfer, follow the process below.

> **NOTE:**  If the worker is being promoted into a different supervisory organization, the receiving manager may have to initiate this process in FermiWorks unless the current manager has the appropriate security level over the organization the worker is moving into.

1.  Type the **Employee's Name** in the Search box.

2.  Press **Enter**.

> **NOTE:**  In order to maintain roles in Fermiworks for a change job (promotion, transfer, etc) the former position must be closed during the change job process.  For example, if you have a manager or an organization who is an Engineer III and they are being promoted to an Engineer IV, you must close the position during the process or they will no longer maintain the manager role of their organization.  The role can be reassigned later but it is much smoother if it happens as part of the process. The documentation for change job has been modified to note this.

3.  Select the employee from the Search Results list.

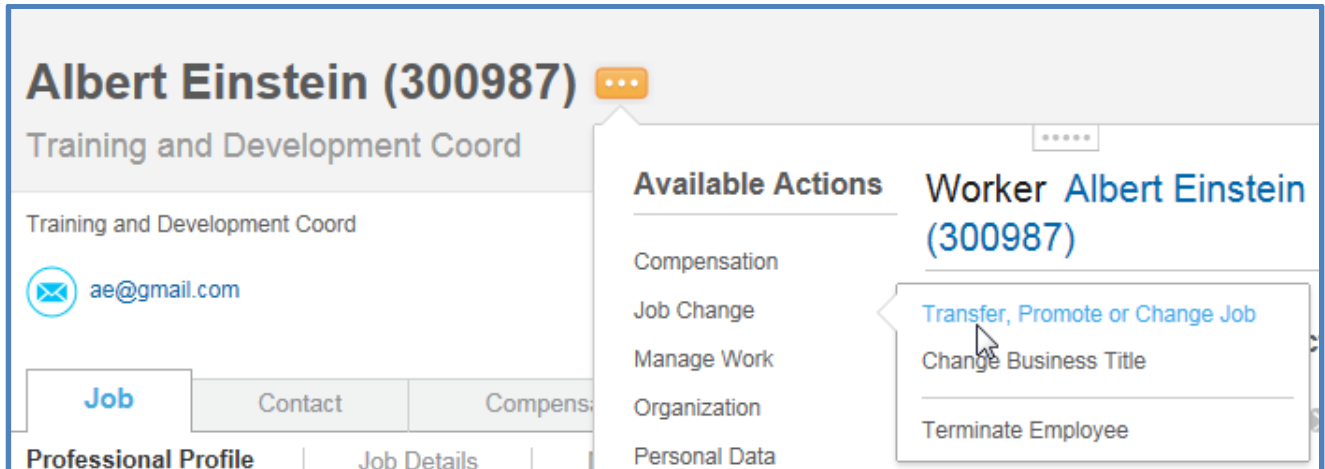4.  Click the **Related Actions** for the employee.

## Albert Einstein (300987)
Training and Development Coord

Related Actions and Preview

5.   Click **Job Change > Transfer, Promote or Change Job** from the Available Actions.
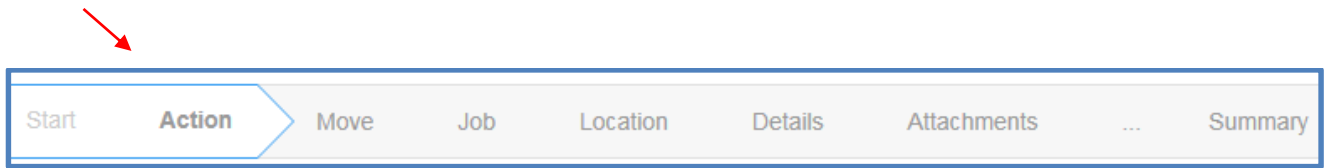


6.   Click the red asterisk (**\***) to open the fields.

7.   Click the prompt and update the following fields as appropriate:

- Who will be the manager after this change?

- Which team will this person be on after this change?

- Where will this person be located after this change?

> **NOTE:**  The team and location default based on the selection of the manager.

8.   Click **Start**.

The chevrons across the top indicate the sections to complete the job change process.



**Action**

1.   Click the red asterisk (**\***) to open the fields to edit.

> **NOTE:**  All fields with a red asterisk (**\***) are required fields.  All Fermilab required fields may not have a red asterisk.  A validation error message displays to identify these required fields.

**Reason:**  Click Prompt and select the appropriate **Reason**.

| REASON | DEFINITION |
|---|---|
| Transfer – Internal Hire | Transfer to the same position (that was not posted on the Fermilab website) and to a different organization |
| Transfer – Without Pay Change | Transfer without a pay increase |
| Transfer – With Pay Change | This reason will be phased out. |

2. **Effective On:**  The date auto populates to the next pay period.

> **NOTE:**  For monthly workers:
>
> If the transfer is on or before the 15th, the date auto populates to the beginning of the month.
> If the transfer date is on or after the 16th, the date auto populates to the next pay period.
>
> For weekly workers the following Monday auto populates.

3.   Click **Next**.

**Move**

> **NOTE:**  The Move section will not display if the worker is not moving to a new organization.

1.   Click the red asterisk (*) to open the fields to edit.

2.   Click the drop down arrow ( ▾ ) and select the appropriate response.

3.   Click the Overlap check box if applicable.

> **NOTE:**  Job overlap allows for multiple workers to fill the same position during a transition period.  The worker leaving this position must have a termination end date entered in FermiWorks to allow for job overlap.  This allows time for the replacement worker to be trained prior to the existing worker leaving this position.

4.   Click **Next**.

## Job

1.  Click the position field to open it.  Click Prompt to select the position the employee is transferring to.  Click **Done**.

> **NOTE:**  There must be an approved job requisition to transfer the employee into.  Verify you have a security level to access the supervisory organization the employee is leaving to initiate the job requisition.

2.  Click Prompt to display the Vacant Positions.  Select the new position to promote the employee into.  Click Done.

3.  Check the Close the current position checkbox to close the position the employee is moving out of if applicable.

> **NOTE:**  In order to maintain roles in Fermiworks for a change job (promotion, transfer, etc) the former position must be closed during the change job process.  For example, if you have a manager or an organization who is an Engineer III and they are being promoted to an Engineer IV, you must close the position during the process or they will no longer maintain the manager role of their organization.  The role can be reassigned later but it is much smoother if it happens as part of the process. The documentation for change job has been modified to note this.

The Job Profile, Job Title and Business Title auto populate.

4.  Click **Next**.

## Location

1.  The Location auto populates.

The **Scheduled Weekly Hours** auto populates based on the hours entered on the approved Job Requisition.

> **NOTE:**  This is the ONLY field to change the scheduled weekly hours.  Do NOT change the Default Weekly Hours in the Summary page.

2.  Click **Next**.

## Details

Review the job change details.  Make any necessary changes.

> **NOTE:**  Do **NOT** change the Default Weekly Hours in the Details section.  This auto populates based on the approved job requisition.

Click **Next**.

**Attachments**

1. Click the **+** to open the **Attachments** section if applicable.

> NOTE:  There are no required forms to attach to complete the transfer process.

2. Click **Next**.

**Organizations**

1. Review the organization assignments and make any changes as required based on the transfer.

> NOTE:  Verify the Cost Center has not changed since the job requisition was approved.

2. Click **Next**.

**Compensation**

1. Click the **Employee Visibility Date**.

2. Enter the appropriate date for the **Employee Visibility Date**.  Enter a date one week from the effective date.

> NOTE:  This date should occur after the discussion with the employee regarding the transfer. This must be a date after the effective date entered in the Action section.

3. Click **No Change** in the Proposed column of the Compensation section to change the worker's compensation if applicable.

   For salary workers:

   Click **No Change** in the Salary row in the Proposed column to.

   For hourly workers:

   Click **No Change** in the Hourly row in the Proposed column if the worker is paid hourly.

4. Enter the new amount.  The Amount Change and Percent Change will auto populate.

5. A housing or stipend allowance can also be entered here.  If there is no allowance, click the **–** each section.  Both sections must be closed to move to the next window.

> **NOTE:**  Do **NOT** remove the Merit details that are auto populated.

**Summary**

1. Review the **Summary** of the job change.

2. Enter any appropriate **Comments** to support the job change.

> **NOTE:**  Any of the fields can still be updated.

3. Click **Submit**.

**View Job Transfer Progress Status**

1. Open your FermiWorks Inbox.

2. Click **View Inbox**.

3. Click the **Archive** Tab.

4. Click the **Transfer** Action.

5. Click the **Process** tab.

6. Review the table to see the status.